



# ESS-Supervisor User Manual for OrangeHRM Version 3.0



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## 1.0 Audience

This document is intended as a complete guide for ESS-Supervisor in using OrangeHRM 3.0. This document is specially designed for non-specialists; specialists may find the document a useful point of reference. By reading this guide, you will learn how to use OrangeHRM through the elements of the graphical user interface and what's behind some of the advanced features that are not always obvious at first sight. It will hopefully guide you around some common problems that frequently appear for users of OrangeHRM.

## 2.0 The System

Log-in to the OrangeHRM System using the ESS-User account that has been created by the Admin as shown in Figure 1.1.



**Figure 1.1: Log in Panel**

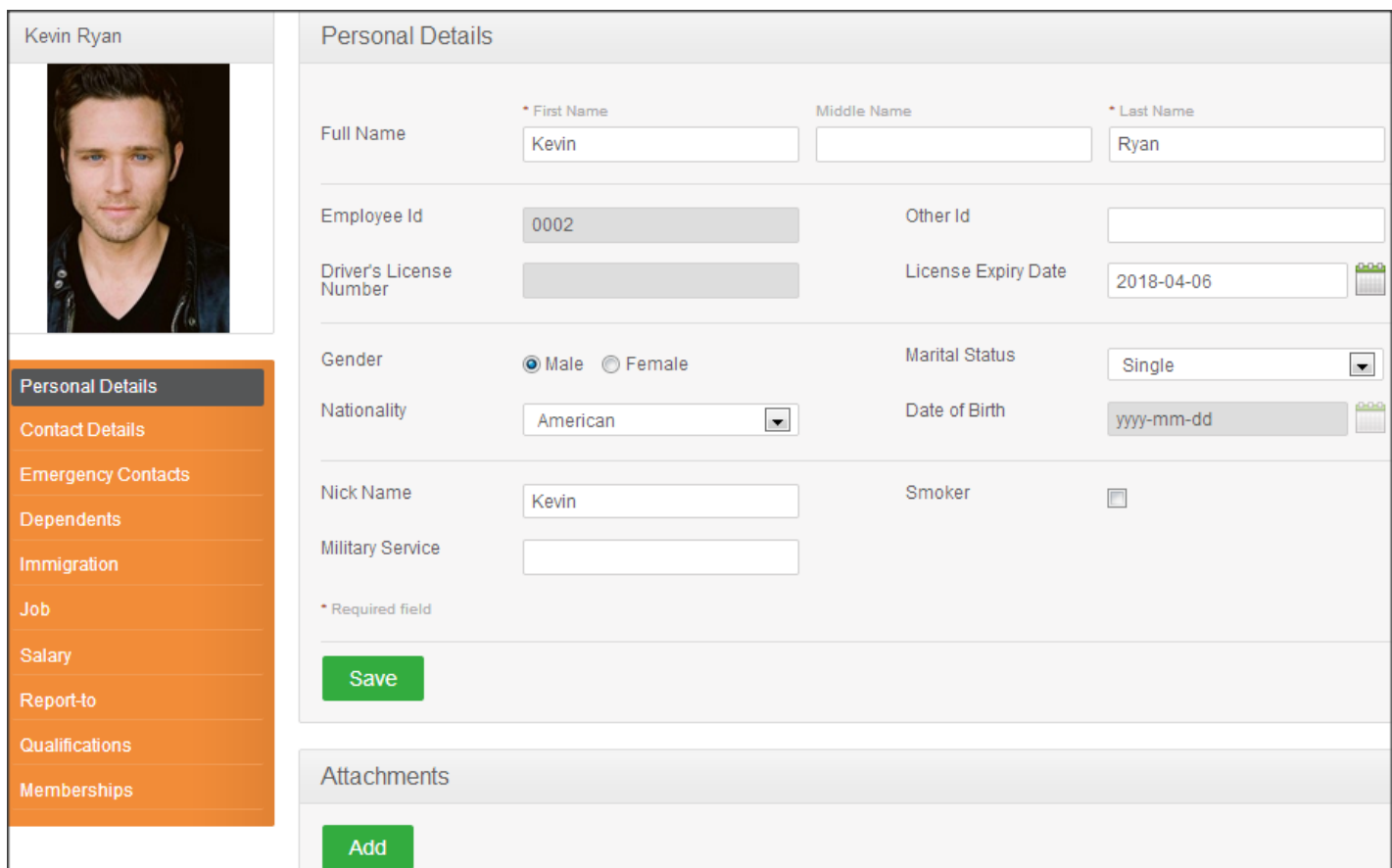
## 3.0 My Info Module

The My Info Module is a powerful tool providing employees of the company with the ability to view relevant information such as personal information and updating personal information with an internet enabled PC without having to involve the HR department.

The functionality of this module spans through the entire system, making information available, anytime, anywhere. All information is subject to company's defined security policy, where he/she can only view the information he/she is authorized to. An ESS-Supervisor can only edit certain fields in the ESS Module.

### 3.1 Personal Details

An ESS-Supervisor which is also an employee will have access to the ESS Module. Upon logging into the system for the first time, the first thing you will see is the "Personal Details" screen as shown in Figure 1.2. They are able to edit and enter certain fields.



Personal Details			
Full Name	* First Name Kevin	Middle Name	* Last Name Ryan
Employee Id	0002	Other Id	
Driver's License Number		License Expiry Date	2018-04-06
Gender	<input checked="" type="radio"/> Male <input type="radio"/> Female	Marital Status	Single
Nationality	American	Date of Birth	yyyy-mm-dd
Nick Name	Kevin	Smoker	<input type="checkbox"/>
Military Service			
* Required field			
<b>Save</b>			
Attachments			
<b>Add</b>			

**Figure 1.2: Personal Details**

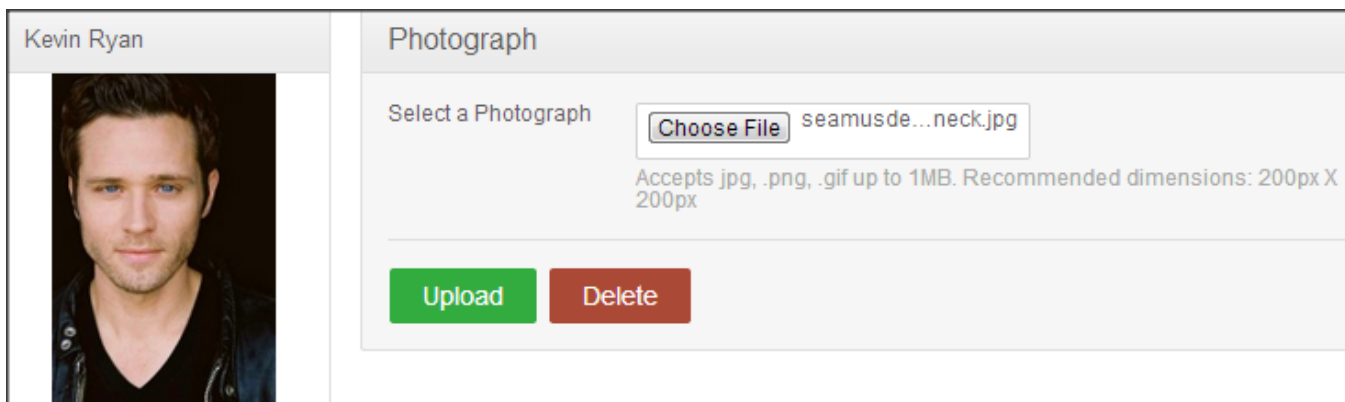
The following are restricted fields where an ESS-Supervisor just like any employee cannot make changes to the following under his personal details:

### Personal Details

- Employee ID
- SSN No
- SIN No
- Driver License No
- Date of Birth

## 3.2 Photograph

The ESS-Supervisor can add a photograph of himself/herself by clicking on the photograph/silhouette at top left corner of the screen, right above the Employee Details column. The screen as shown in Figure 1.3 will appear.



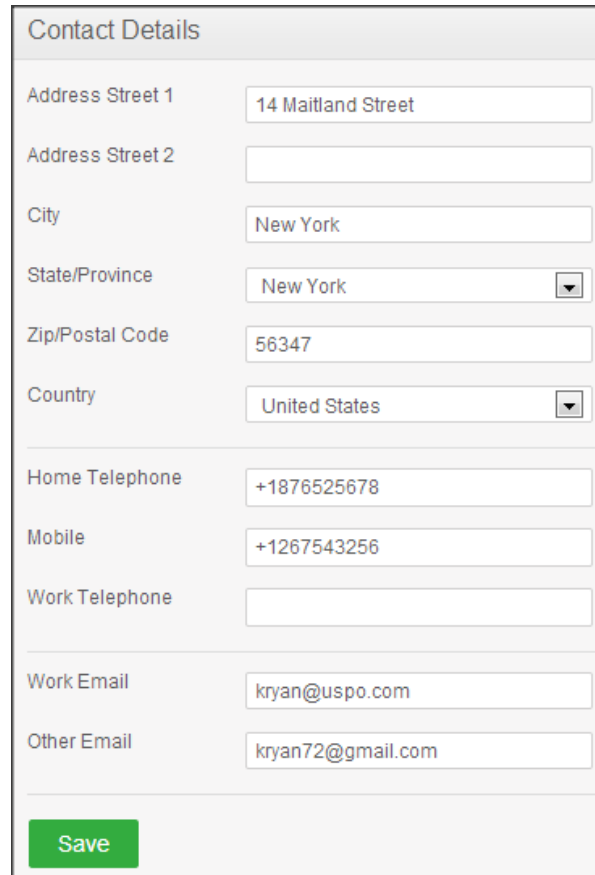
**Figure 1.3: Photograph**

Click “Browse” and then select a photograph from the relevant path. Click “Upload” once you have selected the picture. The picture selected will be populated on the photograph section.

**\*Note:** You may only upload an image with a maximum size of 1 Megabyte in jpg, png or gif format.

## 3.3 Contact Details

Contact information can be entered from here. Click on “Contact Details” under the Employee Details column and the screen as shown in Figure 1.4 will appear.

A screenshot of a web form titled "Contact Details". The form contains several input fields and dropdown menus. The fields are: Address Street 1 (14 Maitland Street), Address Street 2 (empty), City (New York), State/Province (New York), Zip/Postal Code (56347), Country (United States), Home Telephone (+1876525678), Mobile (+1267543256), Work Telephone (empty), Work Email (kryan@uspo.com), and Other Email (kryan72@gmail.com). A green "Save" button is located at the bottom left of the form.

Contact Details	
Address Street 1	14 Maitland Street
Address Street 2	
City	New York
State/Province	New York
Zip/Postal Code	56347
Country	United States
Home Telephone	+1876525678
Mobile	+1267543256
Work Telephone	
Work Email	kryan@uspo.com
Other Email	kryan72@gmail.com
<a href="#">Save</a>	

**Figure 1.4: Contact Details**

Click “Edit” to enter the contact information.

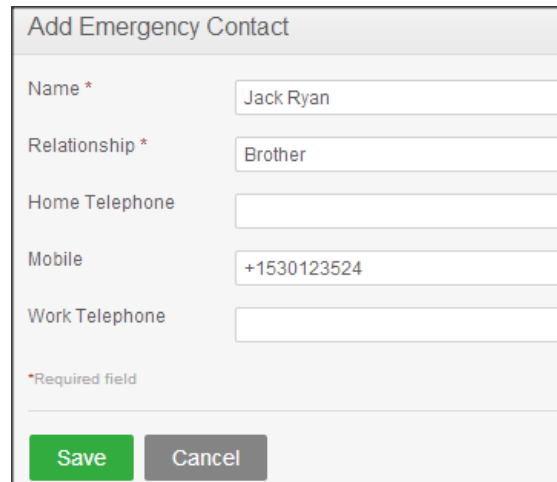
You can edit the following:

- Country – Select the country from the drop down
- Street 1
- Street 2
- City/Town
- State/Province – If the country is United States you can select from the drop down or you need to enter it manually
- ZIP Code
- Home Telephone
- Mobile
- Work Telephone
- Work Email
- Other Email

Once you have completed this form click “Save”.

### 3.4 Emergency Contacts

Contact details which will be needed during an emergency can be entered here. Select “Emergency Contacts” on the Employee Details column and the screen as shown in Figure 1.5 will appear.



The form titled "Add Emergency Contact" contains the following fields:

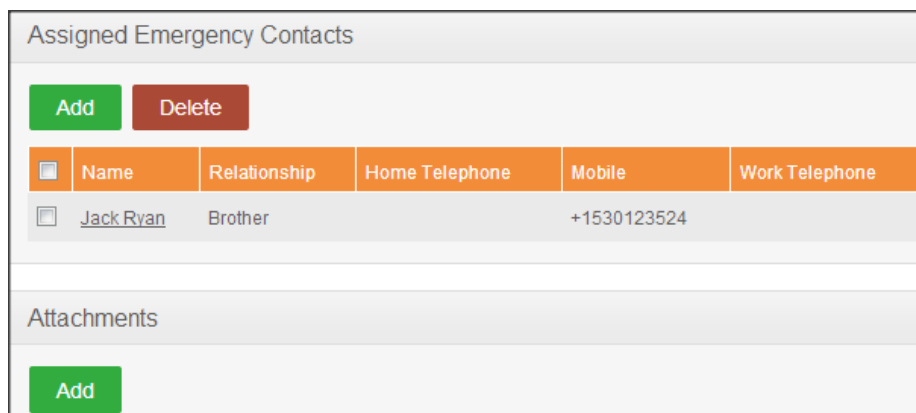
- Name \*: Jack Ryan
- Relationship \*: Brother
- Home Telephone: (empty)
- Mobile: +1530123524
- Work Telephone: (empty)

A legend indicates that fields with an asterisk are required. At the bottom are "Save" and "Cancel" buttons.

**Figure 1.5: Add Emergency Contact**

Enter the “Name” of the person you wish the company to contact in case of emergency, your “Relationship” with the contact person provided and a “Home Telephone” or “Mobile Number” the company can reach him/her.

Click “Save” once the fields are added the emergency contact will be listed as shown in Figure 1.6



The "Assigned Emergency Contacts" section includes "Add" and "Delete" buttons and a table with one entry:

<input type="checkbox"/>	Name	Relationship	Home Telephone	Mobile	Work Telephone
<input type="checkbox"/>	Jack Ryan	Brother		+1530123524	

Below the table is an "Attachments" section with an "Add" button.

**Figure 1.6: Assigned Emergency Contacts**

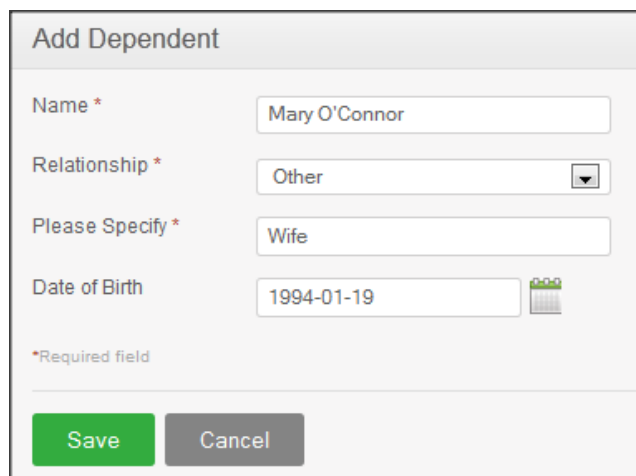
You may add multiple entries of emergency contacts.

To delete an entry, click on the check box next to particular entry. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

You may also upload any attachment that would support the details you have entered on the form by clicking “Add” under the “Attachment” and selecting a file from a relevant path and uploading the following file by clicking “Upload”.

### 3.5 Dependents

If you have any dependents you can enter them here. To add a dependent, click on “Dependents” under the Employee Details column and the screen as shown in Figure 1.7 will appear.



The form titled "Add Dependent" contains the following fields:

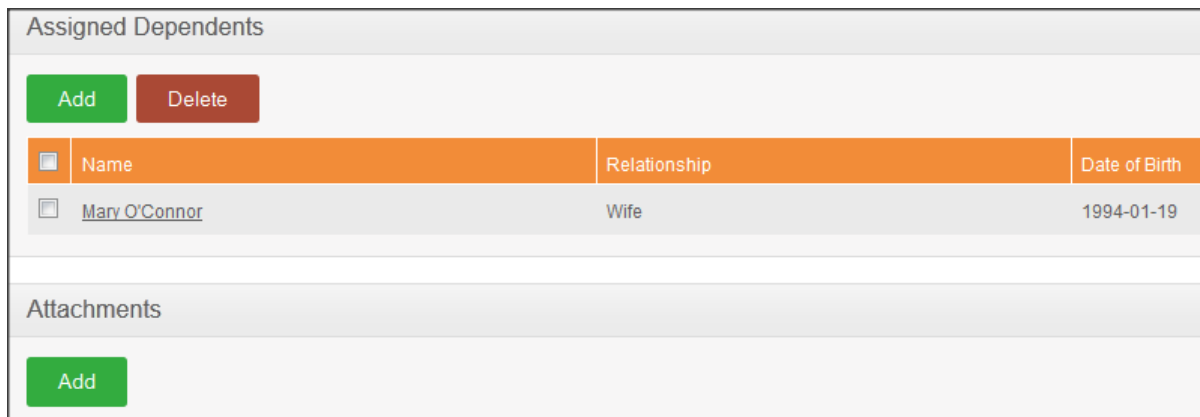
- Name \***: Text input field with the value "Mary O'Connor".
- Relationship \***: Dropdown menu with "Other" selected.
- Please Specify \***: Text input field with the value "Wife".
- Date of Birth**: Text input field with the value "1994-01-19" and a calendar icon.

Below the fields is a legend: **\*Required field**. At the bottom are two buttons: **Save** (green) and **Cancel** (grey).

**Figure 1.7: Add Dependents**

Enter the “Name” of your dependent, the “Relationship” of the dependant to you and his/her “Date of Birth”.

Click “Save” once you have entered the following fields and your dependent will be listed as shown in Figure 1.8.



The "Assigned Dependents" section shows a table with the following data:

	Name	Relationship	Date of Birth
<input type="checkbox"/>	<a href="#">Mary O'Connor</a>	Wife	1994-01-19

Below the table is an "Attachments" section with an **Add** button.

**Figure 1.8: Assigned Dependents**



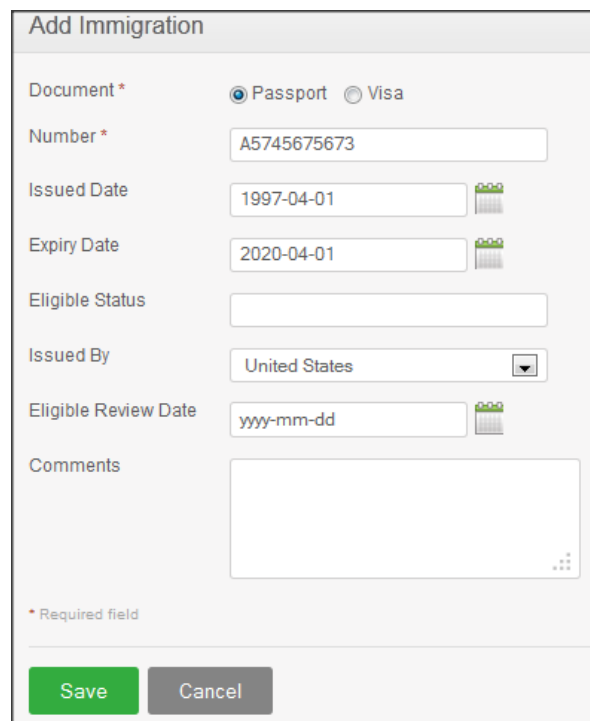
You may add multiple entries of dependents.

To delete an entry, click on the check box next to particular entry. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply click “Delete”.

You may also upload any attachment that would support the details you have entered on the form by clicking “Add” under the “Attachment” and selecting a file from a relevant path and upload the following file by clicking “Upload”.

### 3.6 Immigration

Your immigration information can be entered here. To add your immigration information, select “Immigration” under the Employee Details column and the screen as shown in Figure 1.9 will appear.



The form is titled "Add Immigration" and contains the following fields and controls:

- Document \***: Radio buttons for ☒ Passport and ☐ Visa.
- Number \***: Text input field containing "A5745675673".
- Issued Date**: Date input field containing "1997-04-01" with a calendar icon.
- Expiry Date**: Date input field containing "2020-04-01" with a calendar icon.
- Eligible Status**: Empty text input field.
- Issued By**: Dropdown menu showing "United States".
- Eligible Review Date**: Date input field with placeholder "yyyy-mm-dd" and a calendar icon.
- Comments**: Large text area for notes.
- Required field**: Legend for asterisk (\*) indicating required fields.
- Buttons**: "Save" (green) and "Cancel" (grey) buttons at the bottom.

**Figure 1.9: Add Immigration**

Select the document type (Passport or Visa) you wish to add details of, the “Number” whether it is a passport number or a visa number, the “ Issued Date” , “Expiry Date”, the “Eligible Status” of your Passport/Visa and the “Eligible Review Date” as to when the eligibility status was reviewed. You may write a comment if necessary.



Click “Save” once the fields are added and the following immigration documents will be listed as shown in Figure 2.0.

Assigned Immigration Records

Add

Delete

<input type="checkbox"/>	Document	Number	Issued By	Issued Date	Expiry Date
<input type="checkbox"/>	Passport	A5745675673	United States	1997-04-01	2020-04-01

Attachments

Add

***Figure 2.0: Assigned Immigration Documents***

You may add multiple entries of immigration documents.

To delete an entry, click on the check box next to particular entry. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

You may also upload any attachment that would support the details you have entered on the form by clicking “Add” under the “Attachment” and selecting a file from a relevant path and uploading the following file by clicking “Upload”.

## 3.7 Job

You are only able to view your job details that have been pre-defined by the Admin as shown in Figure 2.1. You are restricted from editing the following fields:

- Job Title
- Jobs Specification
- Employment Status
- Job Category
- Joined Date
- Sub Unit
- Location
- Employment Contract Start Date
- Employment Contract End Date
- Attachments

Job	
Job Title	Finance Manager
Job Specification	Not Defined
Employment Status	Full-Time Permanent
Job Category	-- Select --
Joined Date	2013-03-13
Sub Unit	Finance Division
Location	HQ
<b>Employment Contract</b>	
Start Date	2006-04-05
End Date	yyyy-mm-dd
Contract Details	Not Defined
Attachments	

**Figure 2.1: Job Details**

### 3.8 Salary

The salary information field is completely hidden from the ESS-Supervisor as shown in Figure 2.2. Only the HR Admin has access to this information and has to be manually communicated to the ESS-Supervisor. The ESS-Supervisor will only be able to view his salary details.

You are restricted from editing the following fields in this section.

- Salary Component
- Pay Frequency
- Currency
- Amount
- Comments
- Direct Deposit Details
- Attachments

Assigned Salary Components					
Salary Component	Pay Frequency	Currency	Amount	Comments	Show Direct Deposit Details
Basic		United States Dollar	30000		

**Figure 2.2: Salary Details**

### 3.9 Report To

This feature allows the employees to know whom they report to and is of importance when applying for leave (who can approve/reject leave requests, who can approve/reject submitted timesheet, etc.)

As an ESS-Supervisor, you are only able to view the list of your respective supervisors that you report to (if you have any) and the list of your subordinates as shown in Figure 2.3.

You are restricted from editing the following fields:

- Assigned Supervisors
- Assigned Subordinates
- Attachments

There are two default types of reporting method:

- Direct : functional relationship between employee and supervisor
- Indirect : administrative relationship between employee and supervisor

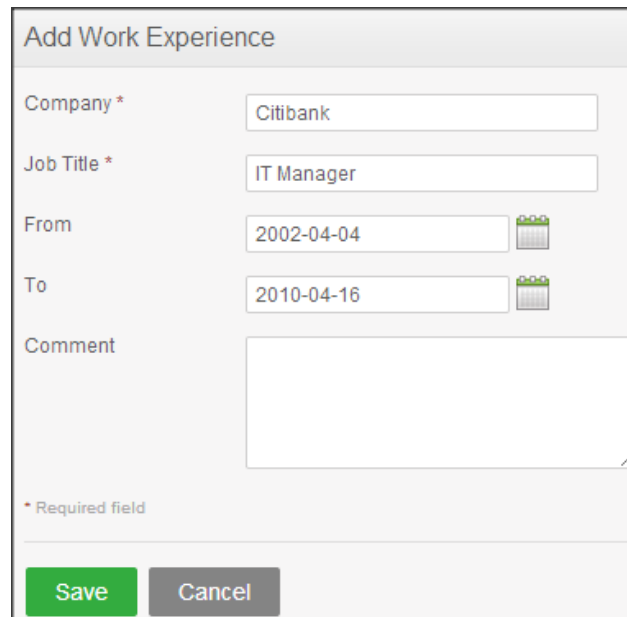
Assigned Supervisors	
Name	Reporting Method
No Records Found	
Assigned Subordinates	
Name	Reporting Method
Jennifer Brown	Direct
Kevin Mathews	Direct

**Figure 2.3: Assigned Supervisors/Subordinate Details**

### 3.10 Qualifications

- Work Experience*

Your previous work experiences can be entered here. To enter previous work experiences, click “Add” under “Work Experience” and the screen as shown in Figure 2.4 will appear.



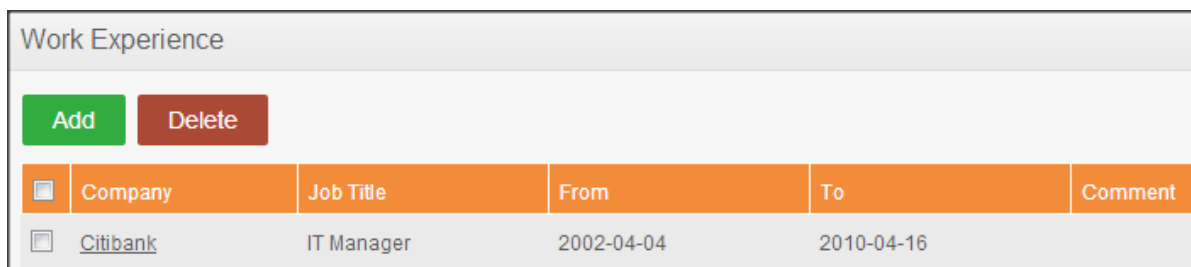
The form titled "Add Work Experience" contains the following fields:

- Company \***: Text input with "Citibank" entered.
- Job Title \***: Text input with "IT Manager" entered.
- From**: Date input with "2002-04-04" entered and a calendar icon.
- To**: Date input with "2010-04-16" entered and a calendar icon.
- Comment**: Text area.

At the bottom, there is a legend: **\* Required field**. Below the legend are two buttons: **Save** (green) and **Cancel** (grey).

**Figure 2.4: Add Work Experience**

Click “Save” once all the fields are entered and the particular work experience will be listed as shown in Figure 2.5.



Work Experience					
<div> <div>Add</div> <div>Delete</div> </div>					
<input type="checkbox"/>	Company	Job Title	From	To	Comment
<input type="checkbox"/>	<a href="#">Citibank</a>	IT Manager	2002-04-04	2010-04-16	

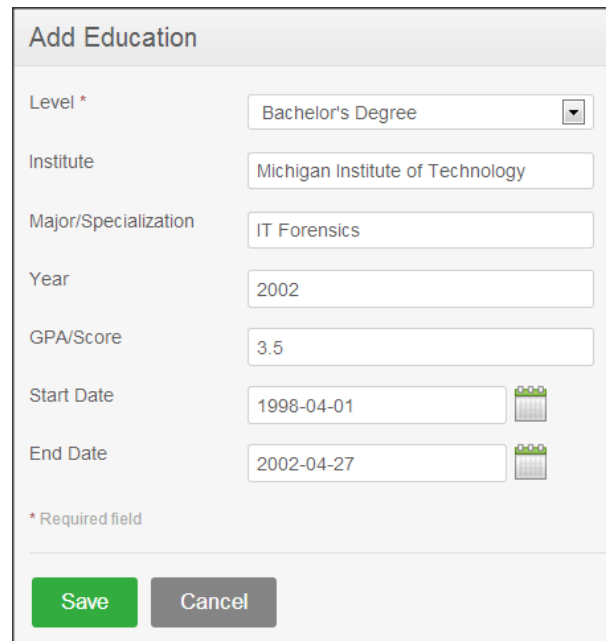
**Figure 2.5: Work Experience List**

You may enter multiple entries of past work experiences.

To delete an entry, click on the check box next to particular entry. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

- **Education**

You are able to enter details of your education here. To enter education details, click “Add” under “Education” and the screen as shown in Figure 2.6 will appear.



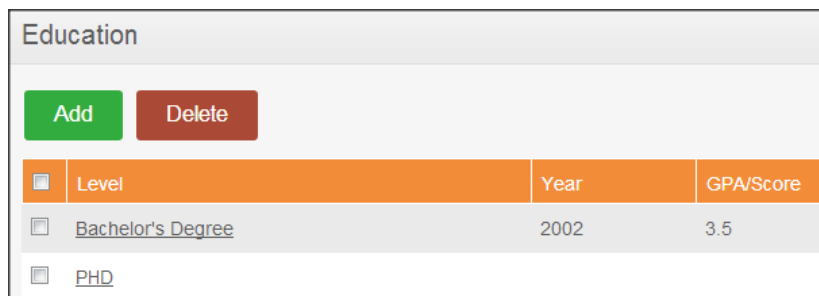
The 'Add Education' form contains the following fields:

- Level \***: A dropdown menu with 'Bachelor's Degree' selected.
- Institute**: A text input field containing 'Michigan Institute of Technology'.
- Major/Specialization**: A text input field containing 'IT Forensics'.
- Year**: A text input field containing '2002'.
- GPA/Score**: A text input field containing '3.5'.
- Start Date**: A date picker showing '1998-04-01'.
- End Date**: A date picker showing '2002-04-27'.

At the bottom, there is a legend for '\* Required field' and two buttons: 'Save' (green) and 'Cancel' (grey).

**Figure 2.6: Add Education**

Click “Save” once all the fields are entered and the particular education details will be listed as shown in Figure 2.7.



Education			
Add		Delete	
<input type="checkbox"/>	Level	Year	GPA/Score
<input type="checkbox"/>	<a href="#">Bachelor's Degree</a>	2002	3.5
<input type="checkbox"/>	<a href="#">PHD</a>		

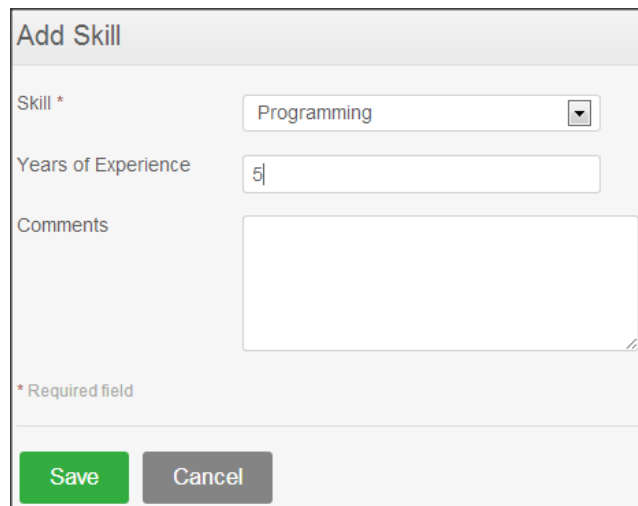
**Figure 2.7: Education history**

You may enter multiple entries of education.

To delete an entry, click on the check box next to particular entry. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

- *Skills*

If you have any special talents or skills those can be entered here. To enter skills click “Add” under “Skills” and the screen as shown in Figure 2.8 will appear.

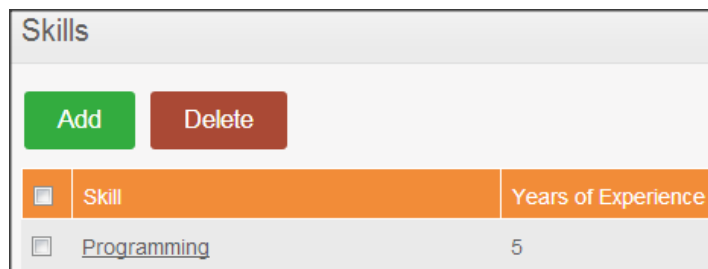


The 'Add Skill' form contains the following fields:

- Skill \***: A dropdown menu with 'Programming' selected.
- Years of Experience**: A text input field containing the number '5'.
- Comments**: A large text area for additional notes.
- \* Required field**: A label indicating that the Skill field is mandatory.
- Buttons**: 'Save' (green) and 'Cancel' (grey) buttons at the bottom.

**Figure 2.8: Add Skill**

Click “Save” once all the fields are entered and the particular skill will be listed as shown in Figure 2.9.



Skills		
<div>Add Delete</div>		
<input type="checkbox"/>	Skill	Years of Experience
<input type="checkbox"/>	Programming	5

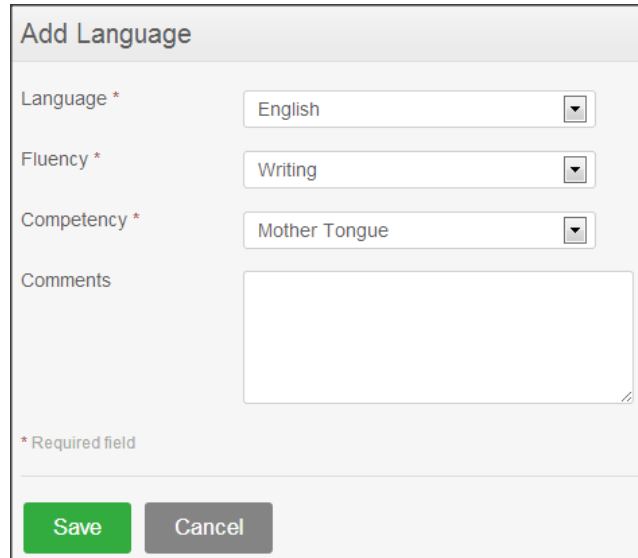
**Figure 2.9: List of Skills**

You may enter multiple entries of skills.

To delete an entry, click on the check box next to particular entry. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

- *Languages*

You can enter the various languages that you are competent in, with the level of competency. To enter your language of competency, click “Add” under “Languages” and the screen as shown in Figure 3.0 will appear.

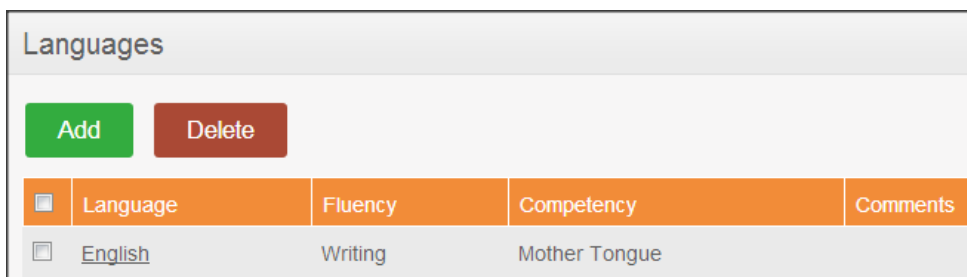


The 'Add Language' form contains the following fields:

- Language \***: A dropdown menu with 'English' selected.
- Fluency \***: A dropdown menu with 'Writing' selected.
- Competency \***: A dropdown menu with 'Mother Tongue' selected.
- Comments**: A large text area for additional notes.
- \* Required field**: A note indicating that the Language, Fluency, and Competency fields are mandatory.
- Buttons**: 'Save' (green) and 'Cancel' (grey) buttons at the bottom.

**Figure 3.0: Add Language**

Click “Save” once all the fields are entered and the particular language of competency will be listed as shown in Figure 3.1.



Languages				
<input type="button" value="Add"/> <input type="button" value="Delete"/>				
<input type="checkbox"/>	Language	Fluency	Competency	Comments
<input type="checkbox"/>	English	Writing	Mother Tongue	

**Figure 3.1: List of Languages of Competency**

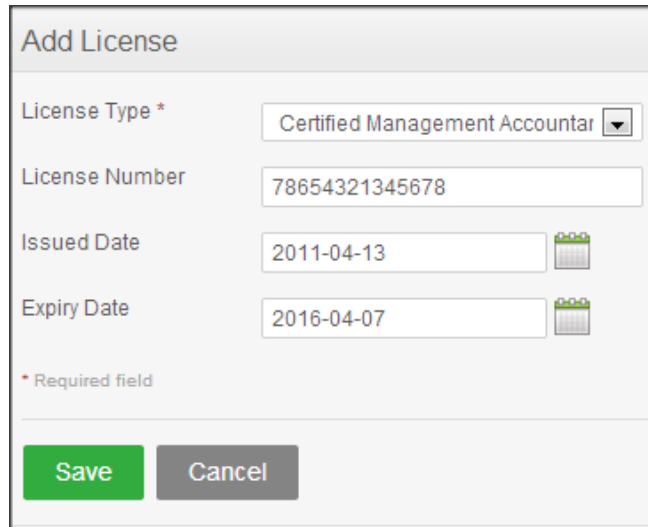
You may enter multiple entries of languages.

To delete an entry, click on the check box next to particular entry. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.



- *License*

Here you can enter the licenses that you may have. To enter licenses click “Add” under “License” and the screen as shown in Figure 3.2 will appear.



The 'Add License' form contains the following fields:

- License Type \***: A dropdown menu with 'Certified Management Accountant' selected.
- License Number**: A text input field containing '78654321345678'.
- Issued Date**: A date input field containing '2011-04-13' with a calendar icon.
- Expiry Date**: A date input field containing '2016-04-07' with a calendar icon.

Below the fields is a legend: \* Required field. At the bottom are 'Save' and 'Cancel' buttons.

**Figure 3.2: Add License**

Click “Save” once all the fields are entered and the particular license details will be listed as shown in Figure 3.3.

License			
<input type="button" value="Add"/> <input type="button" value="Delete"/>			
<input type="checkbox"/>	License Type	Issued Date	Expiry Date
<input type="checkbox"/>	<a href="#">Certified Management Accountant (CMA)</a>	2011-04-13	2016-04-07
<input type="checkbox"/>	<a href="#">Oracle Certified Professional Java SE Programmer</a>	2013-04-10	2019-04-25

**Figure 3.3: List of Licenses**

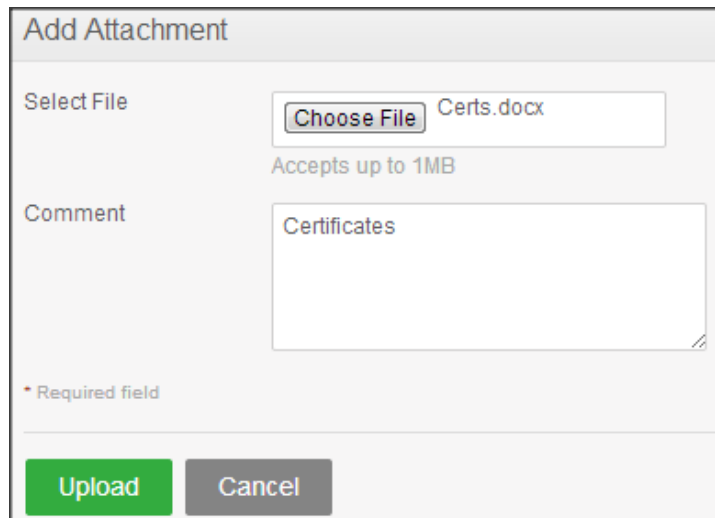
You may enter multiple entries of licenses.

To delete an entry, click on the check box next to particular entry. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

- **Attachments**

Any supporting documents regarding your qualification that you think is needed by the management can be attached here. Please note that each document cannot exceed 1 megabyte, but you can attach more than one document. Click “Add” under attachment and the screen as shown in Figure 3.4 will appear.

Click “Browse” select the file and click Upload” to upload it.



The form titled "Add Attachment" contains a "Select File" section with a "Choose File" button and a text input field containing "Certs.docx". Below this is a note "Accepts up to 1MB". The "Comment" section has a text area with the text "Certificates". At the bottom, there is a red asterisk and the text "Required field". Two buttons, "Upload" (green) and "Cancel" (grey), are at the bottom.

**Figure 3.4: Add Attachment**

Once you have uploaded the file, the file will be listed as shown in Figure 3.5.

Attachments							
<a href="#">Add</a>		<a href="#">Delete</a>					
<input type="checkbox"/>	File Name	Description	Size	Type	Date Added	Added By	
<input type="checkbox"/>	<a href="#">Certs.docx</a>	Certificates	9.93 k	application/vnd.openxmlformats-officedocument.wordprocessingml.document	2013-04-10	Kevin	<a href="#">Edit</a>

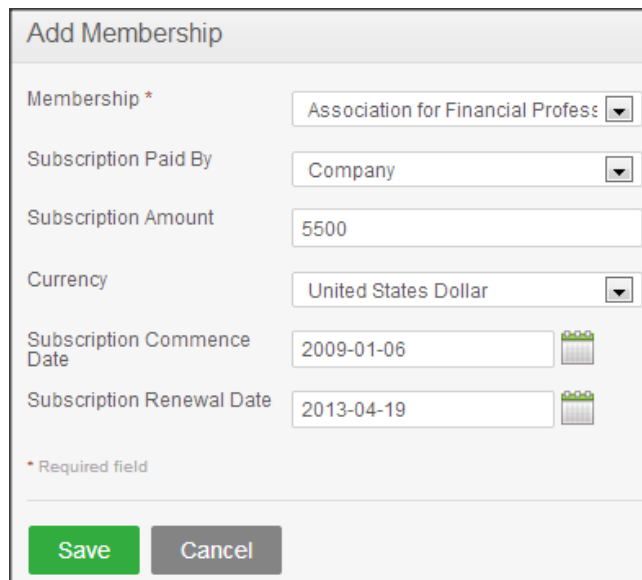
**Figure 3.5: List of Attachments**

You may upload multiple attachments.

To delete an entry click on the check box next to the particular entry and click “Delete”. Multiple selections can be deleted simultaneously.

### 3.11 Membership

If you are a members of any committee, institute etc. those details can be entered here. To enter membership details, go to **My Info>>Personal>>Membership** and click “Add” and the screen as shown in Figure 3.6 will appear.



The form titled "Add Membership" contains the following fields:

- Membership \***: Association for Financial Professe (dropdown)
- Subscription Paid By**: Company (dropdown)
- Subscription Amount**: 5500 (text input)
- Currency**: United States Dollar (dropdown)
- Subscription Commence Date**: 2009-01-06 (calendar icon)
- Subscription Renewal Date**: 2013-04-19 (calendar icon)

\* Required field

Buttons: Save, Cancel

**Figure 3.6: Add Membership Details**

Click “Save” once all the fields are entered and the particular membership details will be listed as shown in Figure 3.7.

Assigned Memberships						
<input type="button" value="Add"/> <input type="button" value="Delete"/>						
<input type="checkbox"/>	Membership	Subscription Paid By	Subscription Amount	Currency	Subscription Commence Date	Subscription Renewal Date
<input type="checkbox"/>	<a href="#">Association for Financial Professionals (AFP)</a>	Company	5500.00	USD	2009-01-06	2013-04-19

**Figure 3.7: Assigned Memberships**

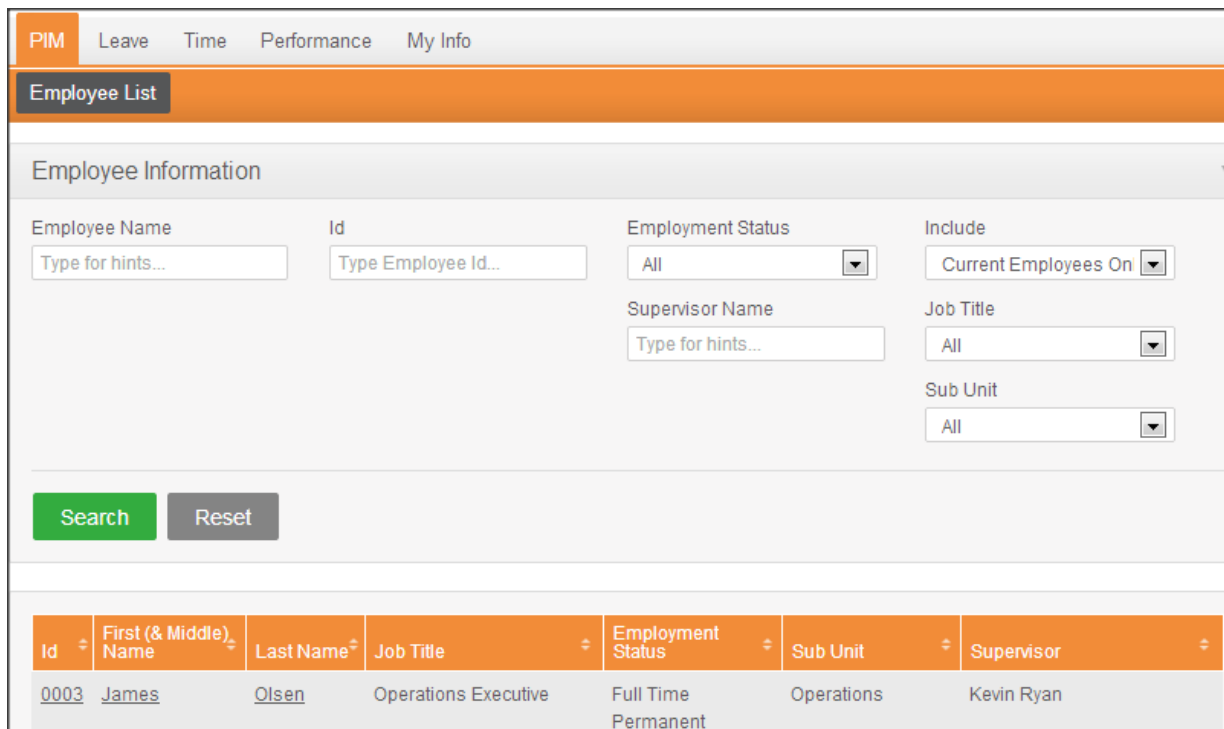
You may enter multiple entries of memberships. To delete an entry, click on the check box next to particular entry. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

You may also upload any attachment that would support the details you have entered on the form by clicking “Add” under the “Attachment” and selecting a file from a relevant path and uploading the following file by clicking “Upload”.

## 4.0 PIM Module

The ESS-Supervisor is able to view the list of all his/her subordinates and all the relevant employee related information, including different types of personal information, detailed qualifications and work experience, etc in this module.

To view employee list, go to **PIM>>Employee List** and the screen as shown in Figure 3.8 will appear.



Id	First (& Middle) Name	Last Name	Job Title	Employment Status	Sub Unit	Supervisor
0003	James	Olsen	Operations Executive	Full Time Permanent	Operations	Kevin Ryan

**Figure 3.8: Employee Information**

You will be able to view at a glance the basic information of all your subordinates such as their First Name, Last Name, Job Title, Employment Status, Subunit and their respective supervisors.

You can view/edit details of your subordinate by clicking on their “Name” or their “ID”.

The ESS-Supervisor will only be able to edit and enter certain fields in his/her subordinates “Personal Information”.

The following are restricted fields where an ESS-Supervisor cannot make changes to the following details of his/her subordinates PIM.

- Salary
- Report-to

## 5.0 Leave Module

The leave module is a comprehensive leave management system where an ESS-Supervisor can apply for leave via the system as well as view/monitor his/her sub-ordinate's leave requests. When the subordinate applies for leave, an email will be sent to notify the supervisor, whom then can approve/reject the leave.

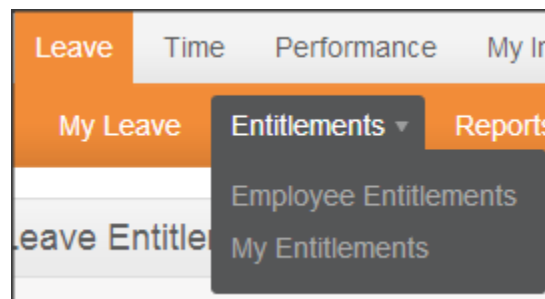
The ESS- Supervisor is also able to view his/her current leave entitlement, leave balance and notification of leave approval from their supervisors (if they too report to another supervisor).

The ESS-Supervisor will be able to view the following on the Leave Module which will further be explained in detail:

- Entitlements
- Reports
- Leave List
- Assign Leave
- My Leave
- Apply

### 5.1 Entitlements

This feature allows you to view your leave entitlement for all leave types (**Leave>> Entitlements >> My Entitlements**), as well as being able to view your subordinate's leave entitlement details (**Leave>>Entitlements>>Employee Entitlements**), as shown in Figure 3.9.



**Figure 3.9: ESS-Supervisor Entitlements menu**

To view his/her own leave entitlement, the ESS Supervisor has to click on **Leave>> Entitlements >> My Entitlements**. He/she can then search by “Leave Type” or “Leave Period”. Clicking “Search” will show all available leave entitlements as shown in Figure 4.0.

My Leave Entitlements

Leave Type

All

Leave Period

2013-01-01 - 2013-12-31

Search

Leave Type	Entitlement Type	Valid From	Valid To	Days
Annual Leave	Added	2013-01-01	2013-12-31	20.00
Total				20.00

**Figure 4.0: ESS-Supervisor- My Entitlements**

To view a subordinate's leave entitlement, the Supervisor has to click on **Leave >> Entitlements >> Employee Entitlements** and then type in the name of the subordinate under "Employee", and select the "Leave Type" and "Leave Period", as shown in Figure 4.1.

Leave Entitlements

Employee

James Olsen

Leave Type

All

Leave Period

2013-01-01 - 2013-12-31

Search

**Figure 4.1: ESS-Supervisor - Subordinate Entitlement Search**

Clicking "Search" will then show the leave that has been entitled to that subordinate, as shown in Figure 4.2.

Leave Entitlements

Employee

James Olsen

Leave Type

All

Leave Period

2013-01-01 - 2013-12-31

Search

Leave Type	Entitlement Type	Valid From	Valid To	Days
Annual Leave	Added	2013-01-01	2013-12-31	20.00
Total				20.00

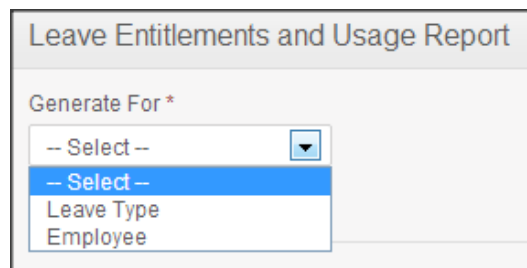
**Figure 4.2: ESS-Supervisor View of Subordinate Entitlement**

## 5.2 Reports

This feature allows ESS-Supervisors to generate Leave Entitlements and Usage Reports of their subordinates (**Leave>>Entitlements>> Leave Entitlements and Usage Report**) as well as for themselves (**Leave>>Entitlements>> My Leave Entitlements and Usage Report**).

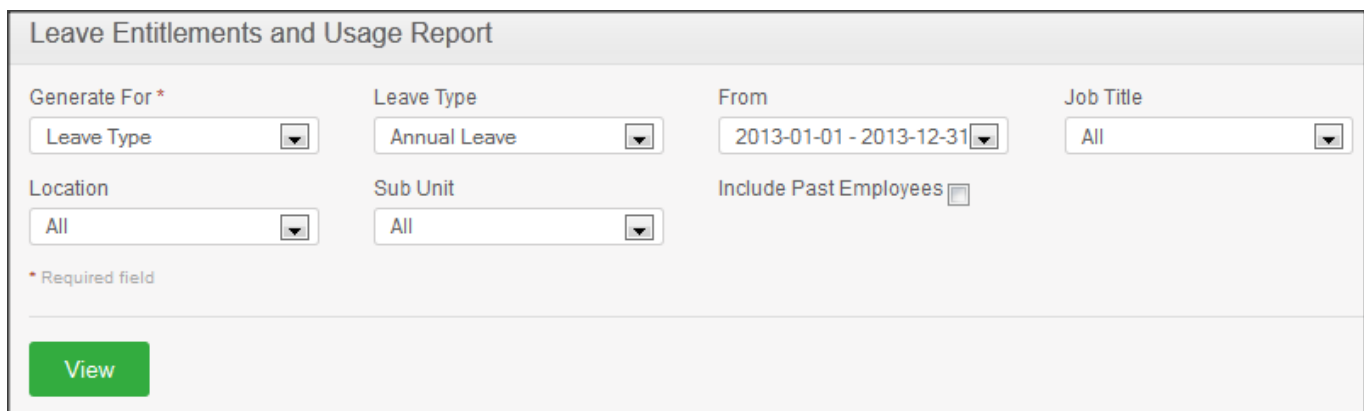
### *Leave Entitlements and Usage Report*

By going to **Leave>>Entitlements>> Leave Entitlements and Usage Report**, the ESS-Supervisor will be presented with the following screen (Figure 4.2.1). Here the ESS-Supervisor can select between two main criteria when generating reports for their subordinates: “Leave Type” and “Employee”.



**Figure 4.2.1: Leave List**

If the HR Admin selects “Leave Type”, he will then be presented with the following fields to select from (Figure 4.2.2).



**Figure 4.2.2: Leave Type Report Generation view**

Once the appropriate fields are selected, the ESS Supervisor can then click “View” and will be presented with the leave report of all subordinates based on the selected criteria (Figure 4.2.3).

Employee	Leave Entitlements (Days)	Leave Pending Approval (Days)	Leave Scheduled (Days)	Leave Taken (Days)	Leave Balance (Days)
James Olsen	<u>20.00</u>	<u>9.38</u>	<u>0.00</u>	<u>0.00</u>	10.63

**Figure 4.2.3: Subordinate Leave Report**

If the “Employee” option is selected under “Generate For” (Figure 4.2.1) the ESS-Supervisor can generate the leave entitlement and usage report for specific subordinates. The name of the subordinate will need to be inserted into the “Employee” field, and a report will be generated for that subordinate (as shown in Figure 4.2.4).

Leave Type	Leave Entitlements (Days)	Leave Pending Approval (Days)	Leave Scheduled (Days)	Leave Taken (Days)	Leave Balance (Days)
Annual Leave	<u>20.00</u>	<u>9.38</u>	<u>0.00</u>	<u>0.00</u>	10.63
Sick Leave	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	0.00

**Figure 4.2.4: Leave Entitlements and Usage Report of a single employee (subordinate)**

### *My Leave Entitlements and Usage Report*

To view personal Leave Entitlements and Usage Report, the ESS-Supervisor can navigate to **Leave >> Entitlements >> My Leave Entitlements and Usage Report**.

The ESS-Supervisor can select the Leave Period that he wishes to generate a report based on, and then click on “View”. The following screen will appear as shown in Figure 4.2.5.

#### My Leave Entitlements and Usage Report

From

2013-01-01 - 2013-12-31
2013-01-01 - 2013-12-31
2014-01-01 - 2014-12-31

**View**

Leave Type	Leave Entitlements (Days)	Leave Pending Approval (Days)	Leave Scheduled (Days)	Leave Taken (Days)	Leave Balance (Days)
Annual Leave	<u>20.00</u>	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	20.00
Sick Leave	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	0.00

**Figure 4.2.5: My Leave Entitlements and Usage Report**



## 5.3 Leave List

This feature shows the entire leave request of your subordinates. When your subordinate applies for leave you will receive an email notification. As an ESS-Supervisor you can approve, reject or cancel the leave request by accessing the “Leave List” page. To view Leave List, go to **Leave >> Leave List** and the screen as shown in Figure 4.3 will appear.

Date	Employee Name	Leave Type	Leave Balance (Days)	Number of Days	Status	Comments	Actions
<a href="#">2013-04-03 to 2013-04-05</a>	<a href="#">Kevin Ryan</a>	Annual Leave	17.00	3.00	<a href="#">Pending Approval(3.00)</a>		<div> Select Action </div> <div> Select Action  Approve  Cancel  Reject </div>

Save

**Figure 4.3: Leave List**

The names of your subordinates appear as a link and by clicking on the name you will be able to access their PIM records.

Select the action to be taken on the leave request by selecting from the “Action” drop down menu to “Approve”/”Reject”/”Cancel”.

Note: You may only perform an action on a pending approval leave or a scheduled leave, you cannot take action on any other leave status.

Click “Save” once an action has been selected and the following leave request will no longer appear on the leave list screen. A mail will be then sent to the subordinate and he can view the status of his leave application.

### Leave Request Details

To view detailed information of your subordinate’s leave request click on the “Date or “Status” to perform an action individually as shown in Figure 4.4. Select the necessary action to the leave request and click “Save”.

Leave Request (2013-04-17 to 2013-04-19) Kevin Ryan						
<a href="#">View Leave Request Comments</a>						
Date	Leave Type	Leave Balance (Days)	Duration (Hours)	Status	Comments	Actions
2013-04-17	Annual Leave	14.00	9.00	Pending Approval		Select Action ▼
2013-04-18	Annual Leave	14.00	9.00	Pending Approval		Select Action ▼
2013-04-19	Annual Leave	14.00	9.00	Pending Approval		Select Action ▼
						Select Action Approve Cancel Reject
Save		Back				

**Figure 4.4: Subordinate's Leave Request Details**

Note: You may only perform an action on a pending approval leave or a scheduled leave; you cannot take action on any other leave status.

Once the necessary actions have been made to the leave requests, they will no longer appear in the leave list. A mail will be then sent to the employee and he can view the status of his leave application.

### Search Leave List

You can view leave using the search toolbar as shown in Figure 4.5 by:

- Specifying the period using the “From” and “To” dates
- Selecting the status or combination of status of the following:
  - Rejected
  - Canceled
  - Pending Approval
  - Approved
  - Taken
- Search for the employee (subordinate)
- Search by Sub-Unit
- You may also include past employees with your search.

Leave List

From

2013-01-01

To

2014-12-31

Show Leave with Status

All

Rejected

Cancelled

Pending Approval

Scheduled

Taken

Employee

Type for hints...

Sub Unit

All

Include Past Employees

Search

Reset

Hide Options

**Figure 4.5: Leave List Search**

## 5.4 Assign Leave

This feature allows the ESS-Supervisor to assign leave for all his subordinates. To assign leave, go to **Leave>> Assign Leave** and the screen as shown in Figure 4.6 will appear.

Assign Leave

Employee Name \*

John Smith

Leave Type \*

Annual Leave

Leave Balance

20.00 [view details](#)

From Date \*

2013-04-04

To Date \*

2013-04-05

Comment

\* Required field

Assign

**Figure 4.6: Assign Leave**

Select the name of the “Employee Name” by entering the first letter of his name and you will see list of employees with that letter and you can select the relevant employee, select the “Leave Type”, the “Dates” in which the leave is to be taken and you can add a “Comment” if necessary. The system also shows the remaining “Leave Balance” for the specific leave type.

Click “Assign” when you are done and the employee and the Admin will be notified via e-mail. The leave balance will also be deducted.

## 5.5 My Leave

Your personal leave request details can be viewed here. To view your leave requests details, go to **Leave>> My Leave** and the screen as shown in Figure 4.7 will appear.

My Leave List

From

2013-01-01

To

2014-12-31

Show Leave with Status

All ☒

Rejected ☒

Cancelled ☒

Pending Approval ☒

Scheduled ☒

Taken ☒

Search

Reset

Date	Employee Name	Leave Type	Leave Balance (Days)	Number of Days	Status	Comments	Actions
<a href="#">2013-04-26</a>	<a href="#">Kevin Ryan</a>	Annual Leave	13.67	0.33	<a href="#">Pending Approval(0.33)</a>	Half day leave.	Select Action <input type="button" value="v"/>
<a href="#">2013-04-17 to 2013-04-19</a>	<a href="#">Kevin Ryan</a>	Annual Leave	13.67	3.00	<a href="#">Pending Approval(2.00)</a> <a href="#">Scheduled(1.00)</a>		<a href="#">Go to Detailed View</a>
<a href="#">2013-04-03 to 2013-04-05</a>	<a href="#">Kevin Ryan</a>	Annual Leave	13.67	3.00	<a href="#">Taken(3.00)</a>		

Save

**Figure 4.7: My Leave List**

You can view leave using the search toolbar as shown in Figure 4.7 by:

- Specifying the period using the “From” and “To” dates
- Selecting the status or combination of status of the following:
  - Rejected



- Canceled
- Pending Approval
- Approved
- Taken

You can choose to cancel a pending approval leave or a scheduled leave however you cannot make any changes on any other leave status.

By clicking on your “Name” you will be directed to your PIM record.

To perform an action, click on the “Action” drop down and select “Cancel”. Click “Save” to confirm action.

You can view complete details of your leave by clicking on the “Date” or “Status” of your leave request and the screen as shown in Figure 4.8 will appear.

Date	Leave Type	Leave Balance (Days)	Duration (Hours)	Status	Comments	Actions
2013-04-17	Annual Leave	13.67	9.00	Scheduled		Select Action Select Action Cancel Select Action
2013-04-18	Annual Leave	13.67	9.00	Pending Approval		Select Action
2013-04-19	Annual Leave	13.67	9.00	Pending Approval		Select Action

Save Back

**Figure 4.8: My Leave Details**

You may perform an action on individual leave request on a per-day basis by selecting options from the “Action” drop down menu. Select “Cancel” to cancel the leave request. Click “Save” to save the changes made.

## 5.6 Apply

You are able to apply for a specific leave type through this feature depending on your leave entitlement. To apply for a specific leave type, go to **Leave>>Apply** and the screen shown as shown in Figure 4.9 will appear.

### Apply Leave

Leave Type \*

Annual Leave

Leave Balance

14.00 [view details](#)

From Date \*

2013-04-26

To Date \*

2013-04-26

Time

From

09:00

To

12:00

Duration

3

Comment

Half day leave.

\* Required field

Apply

**Figure 4.9: Apply for Leave**

Select the leave type from the drop down menu and the “From Date” and “To Date” you require the leave, once you select the dates you will see the “From Time”, “To Time” and “Total Hours”. You can enter the times and the “Total Hours” would automatically populate. The “Leave Balance” would also appear indicating how may leave balance you have for the particular leave type. You may also add a comment on why you need the leave.

**\*Note:** If you are applying for leave for less than 24 hours, the “From Time” and “To Time” option would appear prompting you to enter the times in which you would be on leave.

Once you have filled in the details click “Apply” and a mail will be sent your respective supervisor (if you have one) and/or the Admin for approval. The status of your leave application can be seen in “My Leave” as shown in Figure 5.0.

Date	Employee Name	Leave Type	Leave Balance (Days)	Number of Days	Status	Comments	Actions
<a href="#">2013-04-26</a>	<a href="#">Kevin Ryan</a>	Annual Leave	13.67	0.33	Pending Approval(0.33)	Half day leave.	Select Action
<a href="#">2013-04-17 to 2013-04-19</a>	<a href="#">Kevin Ryan</a>	Annual Leave	13.67	3.00	Pending Approval(2.00). Scheduled(1.00)		<a href="#">Go to Detailed View</a>
<a href="#">2013-04-03 to 2013-04-05</a>	<a href="#">Kevin Ryan</a>	Annual Leave	13.67	3.00	Taken(3.00)		
Save							

**Figure 5.0: My Leave Request**

## 6.0 Time Module

This module automates time tracking related processes of an ESS-Supervisor and his/her subordinates. The functionality of this module is to allow the ESS-Supervisor to enter and submit their timesheet and enter their punch in/punch out time as well as view and approve/reject his/her subordinate's submitted timesheets. The ESS-Supervisor can also track his/her employees' attendance records and enter/submit their attendance records

The ESS- Supervisor will be able to view the following in the Time Module which will further be explained in detail:

- Project Info
- Timesheet
  - My Timesheet
  - Employee Timesheet
- Attendance
  - My Records
  - Punch in/out
  - Employee Records
- Reports
  - Employee Reports
  - Attendance Summary

The ESS–Supervisor can:

- View project information, and view/edit/add project activities if he/she is the project admin.
- Enter, modify and submit personal timesheets
- View / Edit / Approve / Reject/Add timesheets of his subordinates
- Enter his/her punch in/out time
- Enter time events spent on the project activities
- View his subordinates' employee attendance records.
- View subordinate's project reports and attendance summary.

### 6.1 Project Info

If an ESS-Supervisor user has been assigned to a project as a Project Admin, he/she will be able to view the projects that he/she has been assigned to (**Time>>Project Info>>Projects**) and the screen as shown in Figure 5.1 will appear.

Projects

Customer Name

Type for hints...

Project

Type for hints...

Project Admin

Type for hints...

Search

Reset

Customer Name	Project	Project Admins
Citibank	<a href="#">Project A</a>	Kevin Ryan

**Figure 5.1: Projects**

The Project admin can view the project details by clicking on the relevant Project and the screen as shown in Figure 5.2 will appear.

Project

Customer Name \*

Citibank

Name \*

Project A

Project Admin

Kevin Ryan

Description

\* Required field

Cancel

Activities

Add

Delete

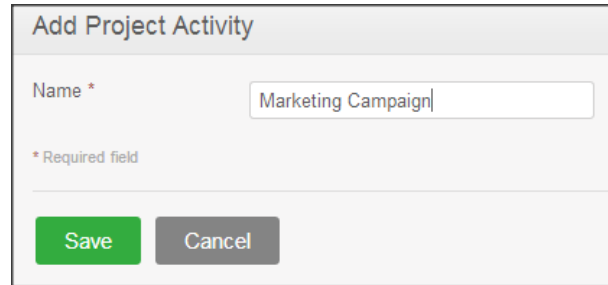
Copy From

	Activity Name
<input type="checkbox"/>	<a href="#">Vendor Management</a>

**Figure 5.2: Project Details**

The project admin cannot edit project details. He/she can add project activities by clicking on “Add” and the screen as shown in Figure 5.3 will appear.

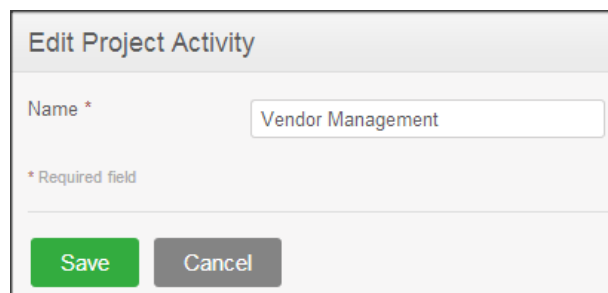




The 'Add Project Activity' form features a title bar at the top. Below it, the 'Name' field is marked with an asterisk and contains the text 'Marketing Campaign'. A red asterisk and the text '\* Required field' are positioned below the input field. At the bottom of the form, there are two buttons: a green 'Save' button and a grey 'Cancel' button.

**Figure 5.3: Add Project Activity**

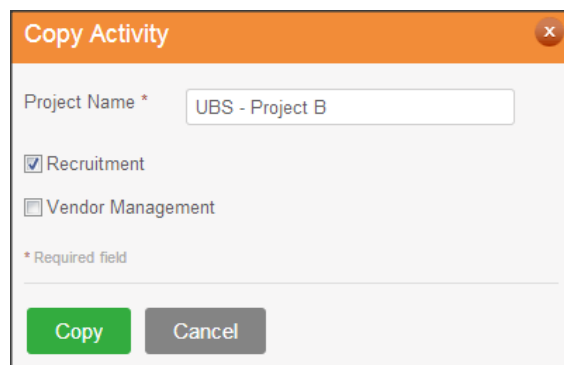
To edit a project activity, click on the relevant project activity and the screen as shown in Figure 5.4 will appear.



The 'Edit Project Activity' form has a title bar. The 'Name' field, indicated by an asterisk, contains 'Vendor Management'. Below the field, the text '\* Required field' is displayed. The form concludes with a green 'Save' button and a grey 'Cancel' button.

**Figure 5.4: Edit Project Activity**

You may copy project activities from another project by clicking “Copy From” and the screen as shown in Figure 5.5 will appear. The relevant “Project Name” needs to be entered, after which the “Activities” related to that project will appear. Select the Activity that you wish to copy, and click “Copy”.



The 'Copy Activity' form is titled with an orange header bar. The 'Project Name' field, marked with an asterisk, contains 'UBS - Project B'. Below this, there are two checkboxes: 'Recruitment' (checked) and 'Vendor Management' (unchecked). The text '\* Required field' is located below the checkboxes. At the bottom, there are 'Copy' and 'Cancel' buttons.

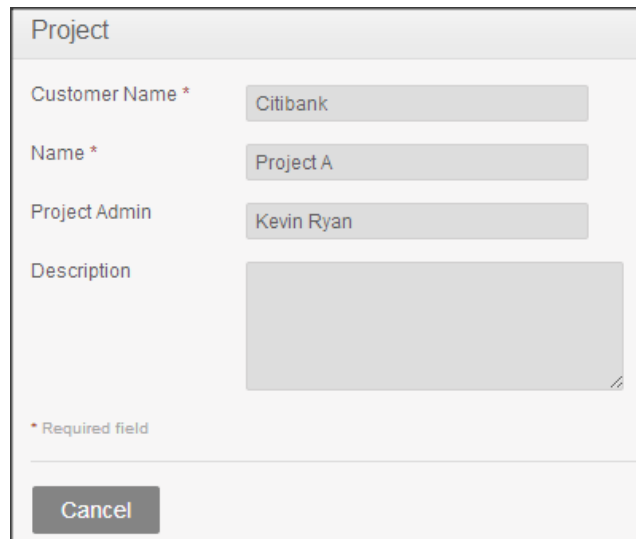
**Figure 5.5: Copy Project Activity**

To delete an entry, click on the check box next to particular entry. It is also possible to delete multiple entries at the same time by clicking the check box entries you wish to delete and simply clicking “Delete”.

## 6.2 Timesheet

This feature allows the ESS-Supervisor to enter his timesheet for a particular project that he was assigned to as well as view and approve/reject his/her subordinates timesheet.

Also, if he/she has been made a Project Admin of a project, he/she can view information about a project (Figure 5.6), as well as having the privilege of being able to add, delete and copy activities from other projects (Figure 5.7).

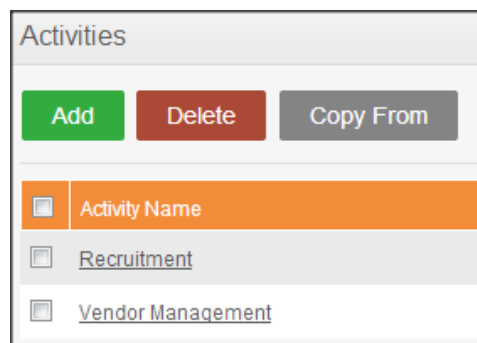


The 'Project' form contains the following fields:

- Customer Name \*: Citibank
- Name \*: Project A
- Project Admin: Kevin Ryan
- Description: (empty text area)

A legend indicates that fields with an asterisk (\*) are required. A 'Cancel' button is located at the bottom left.

**Figure 5.6: Project Information**



The 'Activities' interface includes three buttons at the top: 'Add' (green), 'Delete' (red), and 'Copy From' (grey). Below these is a table of activities:

<input type="checkbox"/>	Activity Name
<input type="checkbox"/>	<a href="#">Recruitment</a>
<input type="checkbox"/>	<a href="#">Vendor Management</a>

**Figure 5.7: Add, Delete, Copy Activities**

- **My Timesheet**

You will be able to enter and submit your timesheet for a particular project that you were assigned to. To enter a timesheet, go to **Time>> Timesheets>> My Timesheets** and the screen as shown in Figure 5.8 will appear.

**Timesheet for Week**

[Add Timesheet](#)

Project Name	Activity Name	Mon 1	Tue 2	Wed 3	Thu 4	Fri 5	Sat 6	Sun 7	Total
No Records Found									

**Status: Not Submitted**
Edit
Submit

**Figure 5.8: Enter Timesheet**

The current week will populate under the “Timesheet for Week”. You may also add a timesheet for another week period by clicking “Add Timesheet” and another field, “Select a Day to Create Timesheet” will appear in which you can select the first day of the week from the drop down menu and the system will automatically calculate a one-week time period from the date entered as shown in Figure 5.8.

**\*Note:** Once you have added a timesheet for a specific week, you cannot move from one timesheet of a specific week period to another unless you have entered the details for the current one that you have opened.

Once you have determined the week period for the timesheet, you can now enter the timesheet details by clicking “Edit” and the screen as shown in Figure 5.9 will appear.

**Edit Timesheet for Week 2013-04-01**

Project Name	Activity Name	Mon 1	Tue 2	Wed 3	Thu 4	Fri 5	Sat 6	Sun 7
<input checked="" type="checkbox"/> Citibank - Project A	Vendor Management	3	4	3	3	4		
<input checked="" type="checkbox"/> UBS - Project B	Recruitment	4	3	4	4	3		

\* Deleted project activities are not editable

Save
Add Row
Remove Rows
Reset
Cancel

**Figure 5.9: Edit Timesheet**

The following options are available when editing the timesheet:

- **Cancel:** allows the user to cancel any changes made in the timesheet.
- **Save:** allows the user to save any changes made in the timesheet.
- **Add Row:** allows the user to enter another row to enter details of project activities and the corresponding times spent.
- **Remove Rows:** allows the user to delete a row by clicking on the selected check box and clicking “Remove Row”.
- **Reset:** allows the user to reset the details entered and enter new timesheet details.



You can select from the “Project Name” and “Activity Name” that was assigned to you and enter the number of hours you have spent for each activity for the whole week. You may also add a row by clicking “Add Row” to enter another timesheet record for another project activity.

Click on the check box beside the project name before you click “Save” to save the particular records and the screen as shown in Figure 6.0 will appear.

**\*Note:** You need to be assigned to a project by the administrator to enter your details in your timesheet.

**Timesheet for Week** 2013-04-01 to 2013-04-07 [Add Timesheet](#)

Project Name	Activity Name	Mon 1	Tue 2	Wed 3	Thu 4	Fri 5	Sat 6	Sun 7	Total
Citibank - Project A	Vendor Management	3:00	4:00	3:00	3:00	4:00	0:00	0:00	17:00
UBS - Project B	Recruitment	4:00	3:00	4:00	4:00	3:00	0:00	0:00	18:00
<b>Total</b>		7:00	7:00	7:00	7:00	7:00	0:00	0:00	35:00

Status: Not Submitted Edit Submit

**Figure 6.0: Save Timesheet**

You may also remove a particular record after the timesheet has been saved by clicking “Edit” and the screen as shown in Figure 6.1 will appear. Click on the check box for the particular row you want removed and click “Remove Rows” and the record will no longer appear on the timesheet record.

**Edit Timesheet for Week 2013-04-01**

	Project Name	Activity Name	Mon 1	Tue 2	Wed 3	Thu 4	Fri 5	Sat 6	Sun 7
<input type="checkbox"/>	Citibank - Project A	Vendor Management	3:00	4:00	3:00	3:00	4:00		
<input checked="" type="checkbox"/>	UBS - Project B	Recruitment	4:00	3:00	4:00	4:00	3:00		

\* Deleted project activities are not editable

Save Add Row Remove Rows Reset Cancel

**Figure 6.1: Remove Rows**

Once the necessary changes have been made, click “Submit” to submit the completed timesheet and you will see the status change from “Not Submitted” to “Submitted” as shown in Figure 6.2.

**Timesheet for Week**
2013-04-01 to 2013-04-07
[Add Timesheet](#)

Project Name	Activity Name	Mon 1	Tue 2	Wed 3	Thu 4	Fri 5	Sat 6	Sun 7	Total
Citibank - Project A	Vendor Management	3:00	4:00	3:00	3:00	4:00	0:00	0:00	17:00
UBS - Project B	Recruitment	4:00	3:00	4:00	4:00	3:00	0:00	0:00	18:00
<b>Total</b>		7:00	7:00	7:00	7:00	7:00	0:00	0:00	35:00

**Status: Submitted**
[Edit](#)

**Actions Performed on the Timesheet**

Action	Performed By	Date	Comment
Submitted	James Olsen	2013-04-02	

**Figure 6.2: Submit Timesheet**

The action performed on the timesheet will appear below the screen indicating the “Action” performed, who it was “Performed By” and the “Date” it was performed.

Once the timesheet has been submitted it will be sent to the HR Admin (if the HR Admin has subscribed to the following notification type) and your supervisors (if you have any).

### • *Employee Timesheets*

The ESS-Supervisor can view his/her subordinate’s submitted timesheet in which the ESS-Supervisor can either approve/reject the timesheet. You can also enter and submit your employee’s timesheet. To view employee’s submitted timesheet, go to **Time >> Timesheet >>Employee Timesheet** and the screen as shown in Figure 6.3 will appear.

**Select Employee**

Employee Name \*

\* Required field

[View](#)

**Timesheets Pending Action**

Employee name	Timesheet Period	
James Olsen	2013-04-01 to 2013-04-07	<a href="#">View</a>

**Figure 6.3: ESS Supervisor View Employee’s Submitted Timesheet**

You may search and view employee’s timesheet through the “Select Employee” and by entering the employee name and clicking “View”.

Timesheet with pending action can also be viewed on the screen. Click “View” to see the details of the timesheet under “Timesheets Pending Action” and the screen as shown in Figure 6.4 will appear.

**Timesheet for James Olsen for Week**
2013-04-01 to 2013-04-07
[Add Timesheet](#)

Project Name	Activity Name	Mon 1	Tue 2	Wed 3	Thu 4	Fri 5	Sat 6	Sun 7	Total
Citibank - Project A	Vendor Management	3:00	4:00	3:00	3:00	4:00	0:00	0:00	17:00
UBS - Project B	Recruitment	4:00	3:00	4:00	4:00	3:00	0:00	0:00	18:00
<b>Total</b>		7:00	7:00	7:00	7:00	7:00	0:00	0:00	35:00

**Status: Submitted**
Edit

**Timesheet Action**

Comment

Approve
Reject

**Figure 6.4: ESS-Supervisor View/Edit/Approve/Reject Timesheet**

You can approve or reject a timesheet and also enter a comment. You can also edit the timesheet by clicking “Edit”, if there are any discrepancies before approving or rejecting the timesheet.

Once approved or rejected the particular employee will also be updated with the status and the status will change from “Submitted” to either “Approved” or “Rejected” when the employee-subordinate logs into the system and checks his/her timesheet status. The action performed by the supervisor will then be listed under “Actions Performed on the Timesheet” as shown in Figure 6.5.

Actions Performed on the Timesheet			
Action	Performed By	Date	Comment
Submitted	James Olsen	2013-04-02	
Approved	Kevin Ryan	2013-04-02	

**Figure 6.5: Actions Performed on the Timesheet by ESS-Supervisor**

## 6.3 Attendance

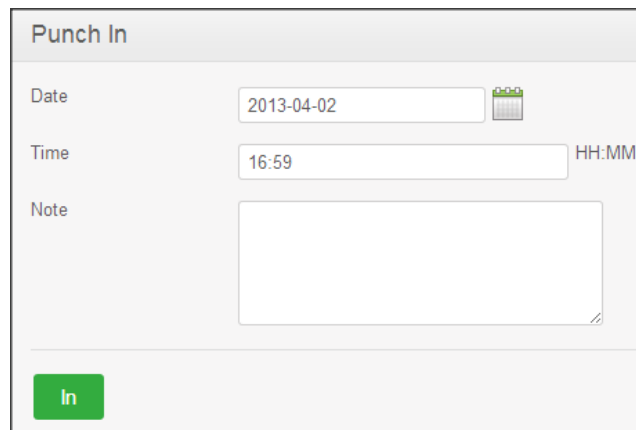
All attendance records of the ESS-Supervisor and his/her subordinates are maintained and recorded under “Attendance” menu.

You are able to do the following task under this feature:

- Punch In/Out
- View personal attendance records
- View subordinates’ attendance records

- *Punch In/Punch Out*

This feature allows capturing the number of hours that you have spent while working for the company. To access the Punch In/Out tab, go to **Time>> Attendance>>Punch In/Out** and the screen as shown in Figure 6.6 will appear.



The screenshot shows a web form titled "Punch In". It contains three input fields: "Date" with the value "2013-04-02" and a calendar icon, "Time" with the value "16:59" and a label "HH:MM", and a "Note" field which is a large empty text area. At the bottom left of the form is a green button labeled "In".

**Figure 6.6: Punch In**

**\*Note:** If the HR Admin has configured the attendance settings, the “Time” and “Date” for both punch in/out could be modified, otherwise the system will automatically capture the “system date/time” and it cannot be modified.

Enter the relevant fields and click “In”. The screen as shown in Figure 6.7 will then appear.

The details of your last punch in time will be populated below the screen as shown in Figure in 6.7. To punch out, click “Out”.

Punch Out

Punched in Time

2013-04-02 16:59

Date

2013-04-02

Time

17:01

HH:MM

Note

Out

**Figure 6.7: Punch Out**

- **My Records**

Once you have entered your Punch In/Out details, it will be listed under “My Records”. To view details, go to **Time>> Attendance>> My Records** and the screen as shown in Figure 6.8 will appear.

My Attendance Records

Date

2013-04-02

**Figure 6.8: View My Records**

Enter the date you want the attendance record to be shown for and the screen as shown in Figure 6.9 will appear.

<div>EditDelete</div>					
	Punch In	Punch In Note	Punch Out	Punch Out Note	Duration(Hours)
<input type="checkbox"/>	2013-04-05 17:26:00 GMT 5.5		2013-04-05 21:29:00 GMT 5.5		4.05
Total					4.05

**Figure 6.9: “My Records” in Detail**

**\*Note:** If the HR Admin has configured the attendance settings the following options: “Edit” and “Delete” could be seen and selected otherwise these options will not be visible.

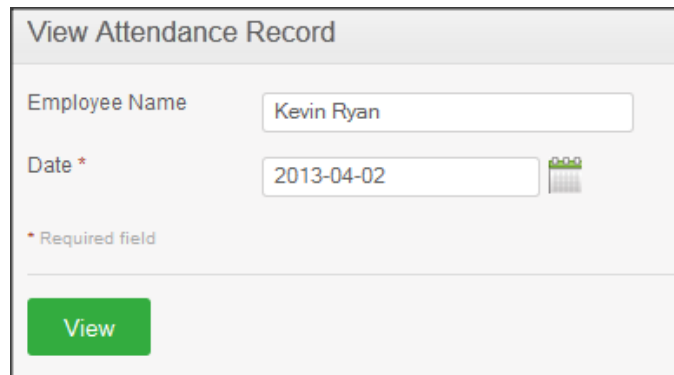
To edit the record, click “Edit” and enter the information. To delete the record, click on the check box beside the record and click “Delete”.



- **Employee Records**

This feature is allows the ESS-Supervisor to view his/her subordinates attendance records.

To view employee records, go to **Time>> Attendance>> Employee Records** and the screen as shown in Figure 7.0 will appear.



**Figure 7.0: View Employee Records**

You may enter the “Employee Name” and the “Date” you want to view the attendance record for and the screen as shown in Figure 7.1 will appear.

<div> <span>Edit</span> <span>Add Attendance Records</span> <span>Delete</span> </div>							
<input type="checkbox"/>	Employee Name	Punch In	Punch In Note	Punch Out	Punch Out Note	Duration(Hours)	Total
<input type="checkbox"/>	Kevin Ryan	2013-04-02 16:59:00 GMT 5.5		2013-04-02 17:02:00 GMT 5.5		0.05	0.05

**Figure 7.1: Employee Record in Detail**

If the HR Admin has configured the attendance settings the following options: “Edit”, “Delete” and “Add Attendance Record” could be seen and selected. To edit the record, click “Edit”, enter the appropriate data and click “Save”.

To delete the record, click on the check box beside the record and click “Delete”.

To add another attendance record, click “Add Attendance Records” and enter the appropriate details.

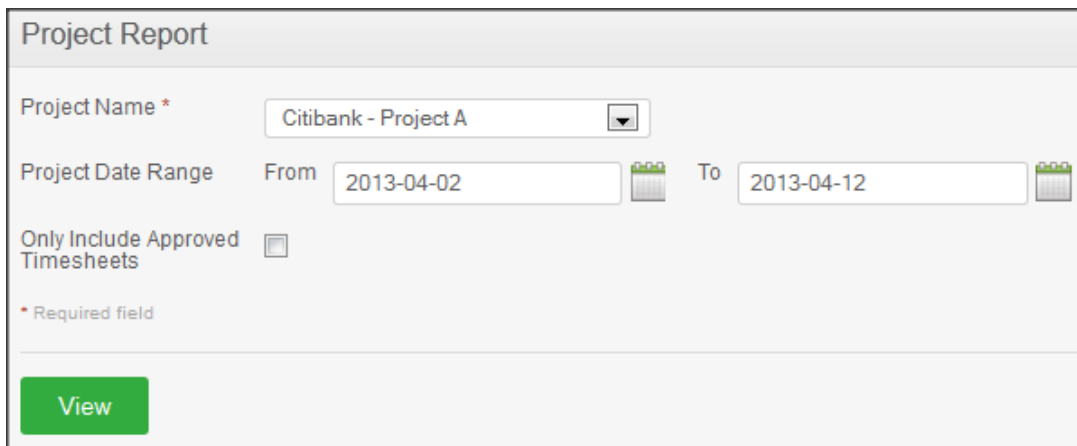
**\*Note:** To add another attendance record, click on the “Add Attendance Records twice for punch in and punch out.

## 6.4 Reports

This feature allows the ESS-Supervisor to run a report and view the project activities that his/her subordinate was assigned to and the time he/she has spent on the particular project. The ESS-Supervisor can also view a report of a subordinate's attendance and the number of hours spent while working in the company.

- **Project Report**

This feature gives the ESS-Supervisor the ability to view reports of projects administered by them or projects assigned to them. To view project reports go to **Time>> Reports>> Project Reports** and the screen as shown in Figure 7.2 will appear.

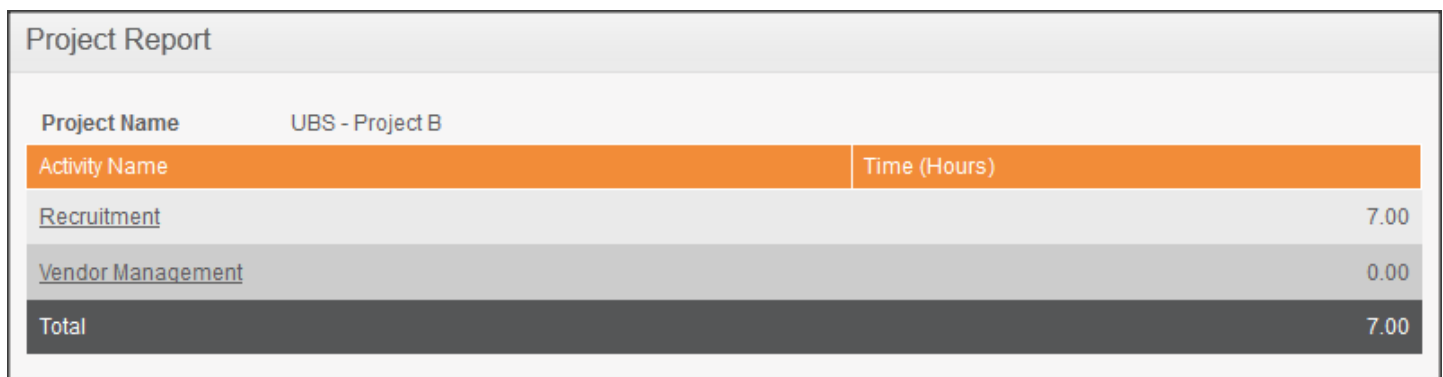


The screenshot shows a web form titled "Project Report". It contains the following fields:

- Project Name \***: A dropdown menu with "Citibank - Project A" selected.
- Project Date Range**: Two date input fields. The "From" field contains "2013-04-02" and the "To" field contains "2013-04-12". Both fields have a calendar icon to the right.
- Only Include Approved Timesheets**: A checkbox that is currently unchecked.
- \* Required field**: A small text label below the Project Name field.
- View**: A green button at the bottom left of the form.

**Figure 7.2: View Project Report**

Select the "Project Name" from the drop down menu and the "Project Date Range" by selecting the dates. The default project name is "All". You may also click on the "Only Include Approved Timesheets" if you want to view only projects reports with approved timesheets. Click "View" once completed and the screen as shown in Figure 7.3 will appear.



The screenshot shows a table titled "Project Report" with the following data:

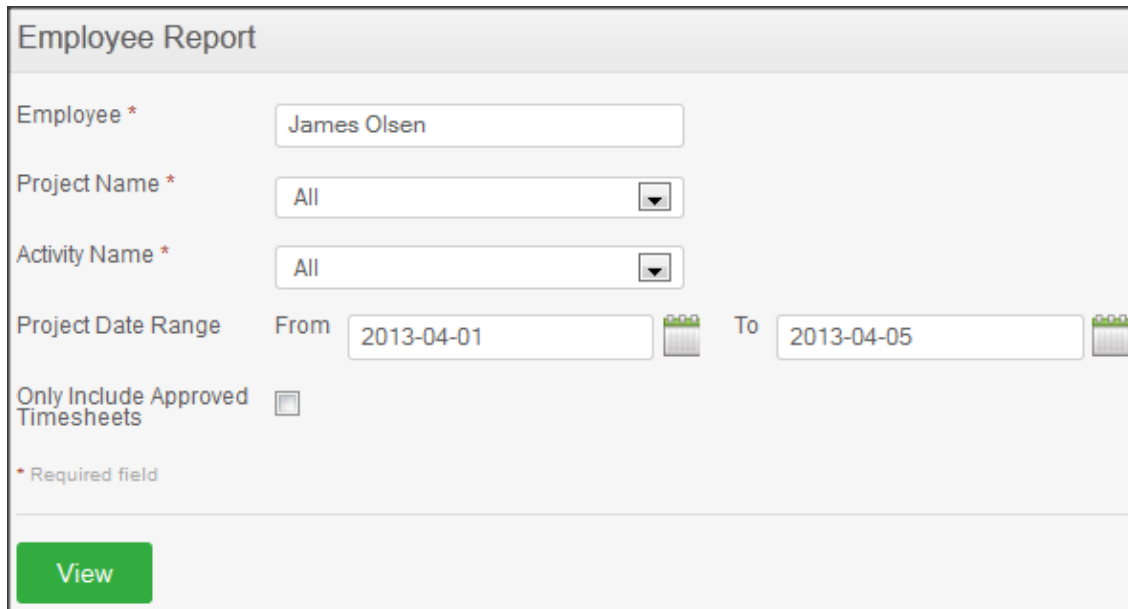
Project Report	
Project Name	UBS - Project B
Activity Name	Time (Hours)
Recruitment	7.00
Vendor Management	0.00
<b>Total</b>	<b>7.00</b>

**Figure 7.3: Project Report**

- *Employee Report*

The ESS – Supervisors can view reports of projects that his subordinates were assigned to. Here the ESS -Supervisor can track the time an employee spent on particular activities.

To view an employee report, go to **Time>> Reports>>Employee Reports** and the screen as shown in Figure 7.4 will appear.



The form titled "Employee Report" contains the following fields:

- Employee \***: Text input field with "James Olsen" entered.
- Project Name \***: Dropdown menu with "All" selected.
- Activity Name \***: Dropdown menu with "All" selected.
- Project Date Range**: "From" date field with "2013-04-01" and "To" date field with "2013-04-05".
- Only Include Approved Timesheets**: Checkbox, currently unchecked.
- \* Required field**: Legend for the asterisk on required fields.
- View**: Green button at the bottom left.

**Figure 7.4: Run Employee Report**

Select the "Employee Name" from the drop down list, the "Project Name" he/she was assigned to and the "Activity Name" he/she took part in and define the "Project Date Range" by selecting from the dates. The default project name and project activity is "All". You may also click on the "Only Include Approved Timesheets" if you want to view only employee reports with approved timesheets.

Click "View" once completed and the screen as shown in Figure 7.5.

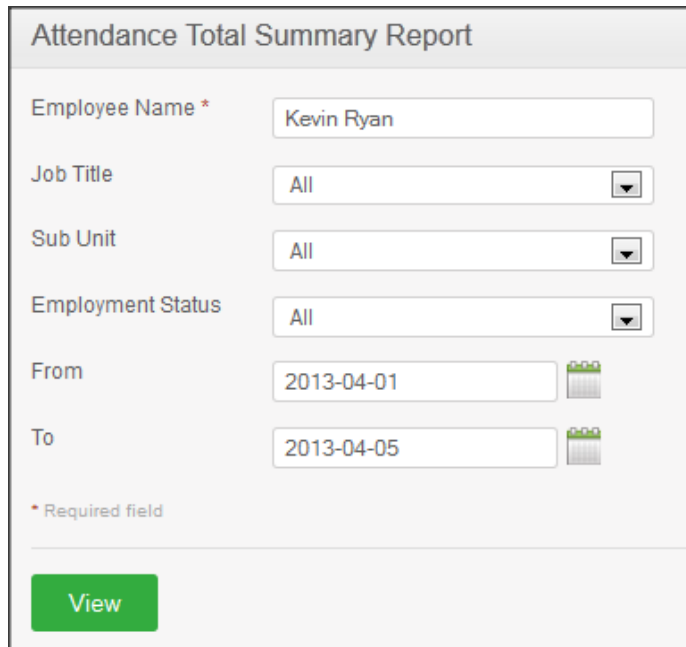
Employee Report		
Employee Name James Olsen		
Project Name	Activity Name	Time (Hours)
Citibank - Project A	Vendor Management	17.00
UBS - Project B	Recruitment	18.00
Total		35.00

**Figure 7.5: Employee Report**

- *Attendance Summary*

The ESS-Supervisor can view the attendance summary of his/her subordinates where the ESS - Supervisor can track the time employees have spent working in the company.

To view an employee's attendance summary, go to **Time>> Reports>>Attendance Summary** and the screen as shown in Figure 7.6 will appear.



The form titled "Attendance Total Summary Report" contains the following fields:

- Employee Name \*: Kevin Ryan
- Job Title: All
- Sub Unit: All
- Employment Status: All
- From: 2013-04-01
- To: 2013-04-05

A green "View" button is located at the bottom left. A legend indicates that an asterisk (\*) denotes a required field.

**Figure 7.6: Run Attendance Summary Report**

Select the "Employee Name" from the drop down list, his/her "Job Title" and "Sub- Unit" he/she falls under and his/her "Employment Status". The default job title/sub-unit/employment status is "All". You may also select the date range you want to view the report for.

Click "View" and the screen as shown in Figure 7.7 will appear.

Attendance Total Summary Report	
Employee Name	Kevin Ryan
From	2013-04-01
To	2013-04-05
Employee Name	Time (Hours)
Kevin Ryan	0.05
<b>Total</b>	<b>0.05</b>

**Figure 7.7: Attendance Summary Report**

## 7.0 Performance Module

The ESS-Supervisor will be able to view his scheduled performance review by his particular supervisor/reviewer, as well as the performance review of an employee where the ESS-Supervisor was assigned as the reviewer. To view your performance review, go to **Performance>>Reviews** and the screen as shown in Figure 7.8 will appear.

<input type="checkbox"/>	Employee	Job Title	Review Period	Due Date	Status	Reviewer
<input type="checkbox"/>	<u>James Olsen</u>	Operations Executive	2013-04-01 - 2013-06-19	2013-07-08	Scheduled	Kevin Ryan
<input type="checkbox"/>	Kevin Ryan	Sales Executive	2013-04-01 - 2013-04-30	2013-06-17	Scheduled	John Smith

**Figure 7.8: Performance Review Summary**

You will see the “Review Period” that your supervisor/reviewer would be conducting the performance review, when the review is “Due” to be submitted and the “Status” of the review and the name of the “Reviewer”.

At a glance you would know that you are the reviewer when you see the “Employee” name (whom you would be reviewing) underlined.

The outcome of your personal performance review will be hidden from you however you will be able to view the details of the performance review that you have conducted for a particular employee by clicking on the “Employee” name and the screen as shown in Figure 7.9 will appear.

Performance Review

EmployeeJames Olsen
Job TitleOperations Executive
ReviewerKevin Ryan
Review Period2013-04-01-2013-06-19
StatusScheduled

Key Performance Indicator	Min Rate	Max Rate	Rating	Reviewer Comments
Time Keeping	1	10	6	

Note

SaveSubmitBack

**Figure 7.9: Enter Performance Review Details**

Click “Edit” to enter fields.

Once you have entered the necessary details and if you think, in the future, you would want to add more comments, click “Save” to save the current details and the details of the performance review will be reflected on the screen and the status will change from “Schedule” to “Being Reviewed” as shown in Figure 8.0.

Performance Review

Employee

James Olsen

Job Title

Operations Executive

Reviewer

Kevin Ryan

Review Period

2013-04-01-2013-06-19

Status

Being Reviewed

Key Performance Indicator	Min Rate	Max Rate	Rating	Reviewer Comments
Time Keeping	1	10	<input type="text" value="6"/>	<div></div>

Note

Save

Submit

Back

**Figure 8.0: Being Reviewed**

If you feel you have entered all the necessary feedback, click “Submit” to submit the outcome of the performance review and the screen as shown in Figure 8.1 will appear and the “Status” of the review will change from “Being Reviewed” to “Submitted”.

**\*Note:** At any point, the HR Admin can track any status change in the performance review whether the employee is still “Being Interviewed” or the review is completed and “Submitted” to the Admin.

Performance Review

EmployeeJames Olsen
Job TitleOperations Executive
ReviewerKevin Ryan
Review Period2013-04-01-2013-06-19
StatusSubmitted

Key Performance Indicator	Min Rate	Max Rate	Rating	Reviewer Comments
Time Keeping	1	10	6	

Note

Back

**Figure 8.1: Submitted Performance Review**

Click “Back” and the screen as shown in Figure 8.2 will appear showing the list of submitted performance reviews by the ESS-Supervisor which will then be either approved/rejected/edited by the HR Admin.

<input type="checkbox"/>	Employee	Job Title	Review Period	Due Date	Status	Reviewer
<input type="checkbox"/>	James Olsen	Operations Executive	2013-04-01 - 2013-06-19	2013-07-08	Submitted	Kevin Ryan
<input type="checkbox"/>	Kevin Ryan	Sales Executive	2013-04-01 - 2013-04-30	2013-06-17	Scheduled	John Smith

**Figure 8.2: Performance Review List**

Please contact us on [sales@orangehrm.com](mailto:sales@orangehrm.com) for more information.